Project: Provident Fund Management System

Client: US Embassy

Version: 1.0

Date: 8th March, 2021

Software Project Proposal

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| --- | --- |
| Client’s Company |  |
| Client’s PoC (Name - Email) |  |
| Version |  |
| Date Created |  |
| Author (Name - Email) |  |

Change Control

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| --- | --- | --- | --- |
| Ver. | Date | Name | Comments |
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Review and Approval

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| Ver. | Date | Name | Comments |
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# Project Summary

This software solution is basically a revamp project for the US embassy where they want to phase out their existing PF management system and introduce a more comprehensive and advanced solution that caters to all of their functional needs.

It is a web-based solution with two interfaces and with the ability to generate a variety of reports for different stakeholders. Following are the objectives of this new system as described in the RFP.

* Achieving a paperless working environment.
* Improve service level and coordination among departments, sections etc.
* Reduction of approval time through automation of workflow, case management, and
* approval cycle.
* A self-sustainable and cost-effective solution.
* Meeting the needs of the organization for the next ten years.
* Automation of manual processes.
* Robust I.T. infrastructure to support the new solution; and
* Ability to generate financial statements and tailored management and financial reports

The project includes, design, development, testing, deployment, data migration and maintenance of the new system. This document contains the technical requirements and timeline for the project and a separate document will have all the financials.

This proposal is in response to the RFP shared by the US Embassy to develop a Provident Fund Management System.

# IN SCOPE

* Design, development, testing and deployment of the system, which includes two web-based interfaces.
* Data migration via cron jobs/services.
* Less than 20 hours of operational and technical training for the team, with less than 10 participants in each.
* Support and Maintenance of the solution with possibility of new feature development.
* Data Encryption, both in transit and at rest.

# OUT OF SCOPE

* Integration with any other fund or bank’s interface.
* Integration with any other existing solution.
* Data entry.
* Domain and Hosting Solutions.
* Payment method integration.
* Content creation of any kind.
* Search Engine Optimization or Search Engine Marketing.
* Multiple deployments of the solutions.
* Repackaging of the solution for any other purpose.
* Documentation other than the Project Requirement Document, Deployment Checklist and User Manuals.
* Automated test suite for functional or performance testing.
* Responsive Design.
* Auto-investments and payments.
* Mobile or tablet applications.

# Web Interfaces

This solution will have two main web-based interfaces.

1. PF Management System
2. Member Portal

# Modules/Features

* Access groups and user roles and privileges.
* Financial reports, auto triggers and custom reports.
* Workflows for creating PF accounts and managing them.
* Ability to print vouchers and cheques.
* Audit trail and audit processes for final settlements and reconciliations.
* Permanent Withdrawals and loans along with complete case management.

# Project Deliverables

Below is the list of deliverables taken from the RFP shared by the client.

* Comparison with other Market Solutions
* Project Work Plan (MS PROJECT or any suitable tool format)
* Project schedule (MS PROJECT or any suitable tool format)
* Work break-down structure (MS PROJECT or any suitable tool format)
* Technical Architecture Report
* SRS (Software Requirements Specification)
* Advantages of using your Solution.
* Test /SQA Plan
* User-acceptance testing and training (UAT Test cases)
* User manual

# Dependencies

* Access to the current system for data migration.
* Detailed requirements and reporting formats.
* Logo and other branding/design related artefacts.
* Email Marketing Solutions.
* Domain and Hosting Solution along with SSL, will be provided by the client.
* Details of the legal framework and business flows/processes.

# Project Estimates

|  |  |
| --- | --- |
| **Module/Phase** | **Effort Hours** |
| Analysis and Planning |  |
| Design (both, architectural and UI and UX) |  |
| Development and Testing |  |
| Deployment |  |
| Technical Documentation |  |
| Training |  |
| **Total Hours** |  |

# Server Requirements

Below are the recommended requirements for the application and database servers. Separate Application and Database server will be set up and managed by the client, and the development team will only do the final deployment. Development and Testing servers will be provided by the development team during the course of development. All testing by either the developer or the US Embassy will be done on the testing server. Live server will only be used for operating a stable and tested application and will not be used for day-to-day development.

Suggested configuration for Application Server and Database server are given below:

## Application Server

|  |  |
| --- | --- |
| Processors | 4 core Intel Xeon |
| RAM | 16 GB |
| Harddisk | 500 GB |
| Internet bandwidth | To be discussed. |
| Data Volume | Unlimited |

## Database Server

|  |  |
| --- | --- |
| Processors | 4 core Intel Xeon |
| RAM | 16 GB |
| Harddisk | 250 GB |

# Technical Tools Required

* PHP Framework: Laravel
* JavaScript framework:Vue.js
* HTML, CSS, Jquery
* Oracle 12 c for Database

# Project Team

The project team will have the following members:

* Project Manager
* Functional/Business Manager
* Front End Developer
* Back End developer
* Mobile Developer
* SQA Manager
* Customer Support Consultant

# Development Process

Define your Software Development approach (short text and diagrams or images)

# Contract

|  |  |  |
| --- | --- | --- |
| S. No. | Item | Description |
| **1** | **Pricing Estimate** | Mention Total price estimate charge .bid for whole project completion |
| 2 | Validity |  |
| 3 | Ownership |  |
| 4 | Licensing |  |
| 5 | **Project Delivery Timeline** | Mention START DATE and END DATE |
| **6** | **Payment Plan** | Breakdown of payment of price of project in 3 parts: for example:  25% before start of development(programming)  25 % before start of UAT  50% after Go Live /Final Deployment |
| 7 | Cancellation |  |
| 8 | Support Period |  |
|  | Ongoing Support and Maintenance |  |
| 10 | Intellectual Property |  |
| 11 | Human Recourse |  |
| 1 | Acceptance |  |